

## *Case Study: Six-Facility Group with a Central Office*

This Texas client is a six-facility group with a central office.

The central office uses several Hi-Tech Software (HTS) accounting applications including General Ledger, Accounts Payable, and Fixed Assets.

Each facility uses our Resident Accounting, Clinical Records Systems, and Rehab Therapy.

### *Client's Goals / Needs*

- A responsive software vendor that would demonstrate the client's importance by meeting special requests beyond a standard software package.
- An accounting system in each facility that could provide data to the corporate office to produce consolidated reports for the entire group.
- Within each facility, an interface to Resource Systems CareTracker™ to capture ADL information for completion of the MDS.

### *Solutions*

This group now uses the following Hi-Tech Software products:

- The Resident Accounting System with integration to the Clinical Records System. These systems share resident face sheet and billing information.
- The Clinical Records System with CareTracker interface.
- Resident Trust Accounting
- Fixed Assets
- Check Reconciliation
- General Ledger
- Accounts Payable
- Payroll to GL interface
- Rehab Therapy



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### *Client's Challenges*

1. To convert six facilities and the central office from a software system they had used for 15 years.
2. To train all employees to use new software effectively and efficiently as quickly as possible.
3. To discover what additional features Hi-Tech would need to add to meet group and state requirements.

### *Our Responses*

1. To ease the transition to a new system, HTS built the client's files prior to installation and training. *This is our standard installation policy.* HTS acquires the most current financial and clinical data for each of the facilities. This assures that the client will start with correct, end-of-month and beginning balances, Medicare and Medicaid billing information, and residents' face sheets and MDS records. The result is a system that is ready to use the same day it is installed.
2. HTS provided on-site training at the home office and the facilities. Installation and training visits were spread out over four months. This allowed our new users to become comfortable with what they had learned. HTS trainers then returned to introduce additional processes.

After on-site training was complete, phone calls from our new clients were our number one priority.

HTS provides on-going training by presenting free Webinars on specific topics.

3. HTS conferred with the client several times, in person and by phone, to review their needs and to plan the addition of changes to the system. HTS added new features and flexibility to the system that allow the client to:
  - Track the completion of all sections of the MDS. The MDS coordinator can review an MDS, determine if it is complete, is ready to print, and submit.
  - Assign meds and treatments to print on facility-specific MAR/TAR forms. NOTE: HTS also provides an Electronic MAR system.
  - Assign start and stop dates to all medication and treatment orders when a resident is discharged and readmitted.
  - Record Secure Notes that cannot be changed.



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## *Workflow*

<b>Resident Accounting</b>	<b>Clinical Records System</b>
Admit the resident and create the resident's <b>Face Sheet</b> record that will be shared throughout both Systems	
Enter Census Change	Physician's Orders
Room Charges	CNA Flow Sheet
Ancillary Charges	Schedule appointments, inoculations, labs, and other events
Cash Receipts	Clinical Assessments
Billing	MDS
	Care Plan
	During the resident's stay, track:
	<ul style="list-style-type: none"><li>• Resident's weight</li><li>• Activities</li><li>• Inoculations</li><li>• MDS-base case mix score and quality indicators</li><li>• CMS 802 Roster and 672 Survey information.</li></ul>



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### *Client's Comments*

*"Your company has done a great job looking at our requests and updating the programs [that] we have needed. Thank you for your continued efforts to make my job and my team's jobs easier."*

*"These are exciting times of change within [our company]. Hi-Tech installation and continued expansion of the use of Resource Systems [CareTracker] will drive us into an integrated system of documentation for improved efficiency and better outcomes."*

### *Outcome*

HTS took great care to make this conversion a seamless transition. Our efforts resulted in a highly successful installation and fulfilled our Mission Statement:

### *Our Mission*

*By dedicating ourselves to delivering comprehensive, integrated software solutions designed specifically for providers of long term care, we assist our clients in achieving the following:*

- *Completing documentation of resident care quickly and easily*
- *Billing, collecting and recording accurate reimbursement for resident care*
- *Avoiding duplication of effort through integration of information*
- *Reducing staff time spent on regulatory issues*
- *Spending more time with our elders to improve their quality of life*



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### *Minimum Requirements for Windows Installation*

The hardware requirements listed below will provide satisfactory processing speed in the HTS programs. Newer equipment will provide better, faster results.

#### **Hardware/Software**

##### **Workstations**

- ☐ Windows 2000, XP or Vista
- ☐ Laser Printer (*not* a DeskJet/InkJet/BubbleJet)
- ☐ Tape Backup or other removable media
- ☐ Phone located near workstations (for support purposes)

##### **File Server (for networked environments)**

- ☐ 1 GB free disk space or more
- ☐ If using a dedicated file server (not used as a workstation), any Windows-based network or LINUX
- ☐ For a dedicated file server, you must map a drive letter exclusively to Hi-Tech

##### **Other**

- ☐ Internet access and email capability. (high speed access recommended)
- ☐ Modem and phone line access on billing system, if applicable
- ☐ Email contact(s) for correspondence



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